

December 11, 2007

RE: Nicholas Dawson v. South Puget Sound Community College
Allocation Review Request ALLO-06-023

Dear Mr. Dawson:

On August 30, 2007, I conducted a Director's review meeting at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of your position. Present at the Director's review meeting were you and Dr. Patricia Hutcherson, Vice President for Human Resources at South Puget Sound Community College (SPSCC). Dr. Hutcherson participated by telephone conference call.

Background

On July 5, 2006, you submitted a Position Review Request (PRR) to the Human Resources Office at SPSCC, requesting your Mail Processing-Driver position be reallocated to Central Services Supervisor (Exhibit 1). After reviewing the PRR and interviewing you and your supervisor, Dr. Hutcherson determined you were working out of class. By memorandum dated September 5, 2006, Dr. Hutcherson notified you she was reallocating your position to the Mail Processing – Driver Lead classification (Exhibit 3).

On October 5, 2006, the Department of Personnel received your request for a Director's review of SPSCC's allocation determination (Exhibit A).

The following summarizes your perspective as well as your employer's:

Summary of Mr. Dawson's Perspective

You assert your position has changed and is no longer limited to mail room duties. Instead, you state you also perform copier center duties, which you believe the college's decision does not adequately address. You assert the volume of copy center jobs will vary, depending on the number of faculty requests and time period within a given quarter.

You assert your position extends beyond the mail room because you have additional responsibility for copying, faxing, facility rentals, and scantron machines. You contend you maintain eight copy machines over two campuses, maintain fax and scantron machines, as well as other office equipment. You describe maintenance as loading paper, pulling documents, ensuring machines are operating and contracts updated, and calling for repairs when needed. You contend your position has the responsibility of running the daily tasks of smaller units to include the mail room, copy center, facility rentals, and scantron services, which you believe can be described as "Central Services."

In addition, you contend you supervise the work of staff from Morningside (two developmentally disabled adults), work-study students, and temporary employees. While you acknowledge the individuals from Morningside also work with a Morningside Coach, you assert you are responsible for directing their daily work to ensure mail is delivered correctly and in a timely manner. You further assert you sign time cards and share feedback with the Coach, which you contend was included in the Coach's evaluation of the employees. While you acknowledge you update your supervisor in weekly staff meetings, you contend you consider workload and deadlines on a daily basis and lead the group of workers on tasks that need to be completed. Therefore, you believe your position should be reallocated to the Central Services Supervisor I classification.

Summary of SPSCC's Reasoning

SPSCC asserts the duties assigned to your position have always included mail processing and copying or duplicating duties. Although SPSCC agrees there are peak times when copy center duties are high, the college asserts your overall assignments fit within mail services. SPSCC acknowledges your assigned duties and responsibilities have expanded since you were hired as a Mail Rater (now classified as Mail Processing – Driver). As such, SPSCC recognizes you have assumed more responsibility than originally intended. For example, SPSCC states you direct the work of hourly employees from Morningside, temporary/seasonal workers, and volunteers. SPSCC also acknowledges you had been asked to train an hourly employee on facility rental duties but asserts those duties were transferred to that employee to allow you more time to perform other duties.

SPSCC recognizes your lead responsibility and, therefore, has reallocated your position to the Mail Processing – Driver Lead classification. SPSCC, however, asserts your position does not meet the definition and distinguishing characteristics of the Central Services Supervisor I class because the college asserts you have not been assigned supervisory responsibility over the employees you lead. Instead, SPSCC contends the Morningside Coach supervises and evaluates the staff from Morningside. SPSCC further contends that you contact the Morningside Coach when you have issues with their employees. Additionally, SPSCC acknowledges you may direct the work of student or temporary workers but contends your position is not expected to perform supervisory functions, such as performance evaluations or authorization of time sheets.

Director's Determination

This position review was based on the work performed for at least the six-month period prior to July 5, 2006, the date you requested reallocation.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of your assigned duties and responsibilities, I conclude your position is properly allocated to the Mail Processing – Driver Lead classification.

Rationale for Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

I reviewed your Position Review Request (PRR) form in conjunction with your supervisor's responses (Exhibits 1 and 2). While you perform both mail room and copy center duties, you indicate you spend more than half of your work time (51%) performing mail services (Exhibit 1, page 2). This is consistent with Dr. Hutcherson's description of responses from you and your supervisor during interviews regarding your position. In his written response to your PRR, your supervisor, Eric Oleson, Director of Auxiliary Services, further indicates you spend more time performing mail center duties than copy center duties.

On the PRR, you describe your position's purpose as managing, coordinating, and providing service to SPSCC's Central Services to ensure mail and copy services are effectively delivered to two campuses. Additionally, you state your position leads/supervises two contracted Morningside staff (developmentally disabled adults), two work-study students, and two part-time employees. In the Supervisor Review section of the PRR (Exhibit 1, page 8), Mr. Oleson indicates that he disagrees with your characterization of duties. In an attached response (Exhibit 2), Mr. Oleson states your position's purpose as follows:

Position performs routine services such as delivering, collecting and sorting mail and performing copy services. . . .he may direct the work of lower-level staff and assure mail quality control standards are met.

The following summarizes the duties you described on the PRR followed by related responses from your supervisor:

Mail Center Duties

- Process bulk and individual incoming/outgoing mail from department;
- Operate, inspect, clean, maintain, and troubleshoot mail equipment;
- Answer inquiries from faculty and staff and resolve routine customer problems;
- Make deliveries for commercial surface or air transport services;
- Determine most cost effective method for sending mail;
- Direct the work of lower-level staff and assure mail quality control standards are met;
- Oversee operations of a high-volume mail processing program including scheduling projects, workflow, and establishing priorities.

In his written response, Mr. Oleson notes that you maintain your schedule to ensure everything gets done. He also clarifies that "lower-level staff . . . are on fixed predictable schedules" and perform "predictable duties of sorting mail and running copy jobs."

- Maintain records of postal expenditures by department, activity, volume, route, frequency and production rates.

Mr. Oleson notes that your duties related to record collecting "consist of collecting data kept in copiers and a mail machine on a monthly basis. [You] then send out monthly department billings based on these reports . . ."

- Develop and implement policies and procedures for mail services.

Mr. Oleson acknowledges that you provide suggestions for improvement but states he has ultimate responsibility for policies and procedures.

- Perform duties of lead/supervisor.

Mr. Oleson clarifies that the Morningside crew is "under the direct supervision of a Morningside coach." He further clarifies you may initially train work-study students but points out the work is "routine" and that you are "not responsible for any reviews." Mr. Oleson states that the Coordinator for Facility Rentals reports directly to him.

Copy Center Duties

- Receive and evaluate work orders and monitor work volumes to establish and assign priorities;
- Assign staff and/or jobs to meet production deadlines;
- Perform duties of copy operator lead;
- Monitor, troubleshoot and schedule maintenance service for copiers, fax machine, and scantron machine;
- Train staff on above machines
- Order supplies, maintain inventory, billing/budget records, and work records; prepare reports;
- Perform duties of supervisor for Copy Center.

Again, Mr. Oleson notes that you maintain your schedule to ensure work gets completed, and he states you "may direct the work of lower-level staff" to ensure quality control standards are met. While you provide initial training and direction, Mr. Oleson does not consider your position a supervisory position because Morningside staff work with a Coach, which you do not dispute, and the evening person "copies all jobs that are left for him to complete" (Exhibit 2).

Mr. Oleson describes your *decision-making authority as relating to postage rates, work flow of redundant tasks, basic direction of lower-level staff, and timing of day to day functions*. Mr. Oleson notes that *changes in procedures and operations need to be cleared through him (Exhibit 1, page 8)*.

When comparing the above duties and responsibilities to the job classifications, I considered the Mail Processing and Delivery Services Occupational Category, including Mail Processing – Driver Lead; Copy Center Lead A & B; and Central Services Supervisor I.

The category concept for the Mail Processing and Delivery Services Occupational Category states, in part, positions utilize knowledge of United States Postal Services regulations to perform mail services in a mail services unit or department. Duties typically include delivering, collecting, and processing mail, operating a variety of mail machines, and providing information to mail service customers. The majority of duties you perform fit within this category.

The distinguishing characteristics of the Mail Processing – Driver Lead class note, in part, positions at this level "regularly assign, instruct, and check the work of others and independently oversee and perform mail services including sorting, processing, deliver, and collecting mail, and operating mail management system." Further, positions typically interpret rules and regulations concerning mail operations, resolve complex problems with customers, recommend cost effective methods, and address special mailing requirements. These characteristics are consistent with the duties you perform.

Although the examples of work do not form the basis for an allocation, they lend support to the work envisioned within a classification. The following examples of work are listed under the Mail Processing – Driver Lead class and most relate to the duties you perform:

- Directs the work of lower-level staff and assures mail quality control standards are met;
- Schedules and organizes work for mailing services personnel;
- Operates, maintains, and troubleshoots complex multi-station inserting equipment including intelligent, integrated technology mail equipment;
- Delivers, collects and processes mail;
- Maintains production records; produces periodic reports.

Because a significant part of your job involves the copy center, I reviewed the Copy Center Lead A & B class specification. The definition states that positions provide “copy service through the coordination of activities at assigned copy center(s).” The distinguishing characteristics note that under general direction, positions are “responsible for daily operations of assigned copy center(s) each producing 200,000 or more copies per month.” Similar to the Mail Processing – Driver Lead class, positions “[r]egularly assign, instruct and check the work of others . . .” While a portion of your work may also fit the Copy Center Lead classification, you indicated that copy volumes fluctuated based on faculty needs or specific timeframes within an academic quarter. Although copy center volumes may be high at certain times, the majority of your duties, as stated, are devoted to mail room activities. Therefore, the Mail Processing and Delivery Occupational category is a better fit.

When considering the Central Services Supervisor I classification, I first considered the definition, which states the incumbent supervises an organization providing a variety of central services. Those services include central duplication and mail distribution and collection, services you provide in the mail room and copy center. I also acknowledge you perform scantron services and ensure the equipment in your area is operating smoothly. However, your position has not been assigned supervisory responsibility. While you may lead and direct the work of others, this is not the same level of supervision assigned to supervisory positions. The Washington State Classification and Pay Administrative Guide defines supervisor as follows:

An employee assigned responsibility by management to participate in all of the following functions with respect to their subordinate employees: (1) selection of staff, (2) training and development, (3) planning and assignment of work, (4) evaluating performance, (5) adjusting grievances, and (6) taking corrective action.

You certainly direct the work of others, which can be described as providing work guidance to others. You also lead because you “regularly assign, instruct, and check the work” of employees performing similar duties (Washington State Classification and Pay Administrative Guide). Additionally, the distinguishing characteristics of the Central Services Supervisor I class state that positions in this class are “distinguished by the responsibility of directing, at the operations level, the activities of several smaller units of operating sections . . .” Although you handle the day to day functions in the mail room and copy center, your supervisor has indicated your responsibility is limited to organizing the work flow of routine tasks and providing direction to lower-level staff. Your supervisor further indicated that he retained the ultimate responsibility at the operational level. After discussing your duties with Dr. Hutcherson, she concluded the level of direction you provide reaches lead responsibility. I agree the amount of direction you provide extends beyond simply directing the work of others and also conclude your duties and responsibilities are consistent with a lead position.

Based on the information provided and our discussion during the Director's review meeting, it is clear you have an important role in ensuring the mail room and copy center operations run smoothly and efficiently. It is also evident that your efforts are greatly appreciated by faculty and staff at the college (Exhibit 7). However, a position review is not an evaluation of performance. Likewise, it does not reflect an individual's ability to perform higher-level duties. Rather, a position review is limited to the duties and responsibilities assigned to a position and how the majority of those duties best fit the available job classifications. Based on the overall assignment of work, the Mail Processing – Driver Lead classification best describes your position.

Appeal Rights

If this position is covered by a Collective Bargaining Agreement, please refer to the contract to determine whether the parties have appeal rights to the Personnel Resources Board.

If this position is not represented, WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board by filing written exceptions to the Director's determination in accordance with Chapter 357-52 WAC. An appeal must be received in writing at the office of the Personnel Resources Board within thirty (30) calendar days after service of the Director's determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Teresa Parsons
Director's Review Supervisor
Legal Affairs Division

c: Dr. Patricia Hutcherson, SPSCC
Lisa Skriletz, DOP

Enclosure: List of Exhibits